

Item 1. [Form ADV Part 2B](#)

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## Brochure Supplement for David Matulewicz

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Supplement Date: May 28, 2024

This Brochure Supplement provides information about David Matulewicz that supplements the Holos Integrated Wealth, LLC (“Holos”) brochure. You should have received a copy of that brochure. If you did not receive Holos’ brochure or if you have any questions about the contact of this supplement, please contact us at the telephone number or email address shown above. Additional information about David Matulewicz ([CRD No. 4406746](#)) is available on the Investment Adviser Public Disclosure website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

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## Item 2. [Educational Background & Business Experience](#)

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### A. Investment Adviser Representative's Information

David J. Matulewicz  
Born: 1977

### B. Educational Background

Centre College – Bachelor of Arts, Philosophy and Economics

### C. Business Experience

Holos Integrated Wealth, LLC, Investment Adviser Representative	1/2024 - Present
Arkadios Wealth Advisors, Investment Adviser Representative	6/2020 – 5/2024
Arkadios Capital, Registered Representative	6/2020 – 12/2023
Triad Advisors, LLC, Registered Representative	1/2016 – 7/2020
Triad Hybrid Solutions, LLC, Investment Adviser Representative	1/2016 – 7/2020

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## Item 3. [Disciplinary Information](#)

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There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

A full report that reflects the professional background, business practices, and conduct of our advisory agents is available through the Financial Industry Regulatory Authority's (FINRA) BrokerCheck system link at [finra.org/brokercheck](https://finra.org/brokercheck) or you may request disclosable information under BrokerCheck by calling (800) 289-9999, a toll-free hotline operated by FINRA.

You may also access a full report of our advisory agents through the IARD link at [adviserinfo.sec.gov](https://adviserinfo.sec.gov). Should you have any technical difficulties with this link you can call the IARD Call Center (240) 386-4848 for further assistance.

The information that appears on these websites is collected from individual investment adviser representatives, investment adviser firm(s), and/or securities regulator(s) as part of the securities industry's registration and licensing process.

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## Item 4. [Other Business Activities](#)

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David Matulewicz is also licensed as an independent insurance agent. Mr. Matulewicz is licensed to sell insurance products through Raffa Financial Services and BKA Private Wealth Consultants. Mr. Matulewicz will earn commission based on compensation for selling insurance products, including insurance products he sells to you. Insurance commissions earned by Mr. Matulewicz are separate and in addition to our Wealth Management Fees. This practice presents a conflict of interest because persons providing investment advice on behalf of our Firm who are insurance agents have an incentive to recommend insurance products to you for the purpose of generating commissions rather than making recommendations based solely on your needs. We manage this

conflict of interest by ensuring that the issuing insurer reviews the potential sale of any product to determine adherence to insurance suitability standards. Clients are under no obligation, contractually or otherwise, to act upon our recommendations related to insurance products and are not obligated to purchase insurance products through any person or entity affiliated with our Firm.

Mr. Matulewicz is a member of Delta Community Partners, LLC, an entity through which Mr. Matulewicz receives revenue as an independent insurance representative. Delta Community Partners, LLC conducts no other business.

**Item 5. [Additional Compensation](#)**

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When providing advisory services on behalf of Holos, Mr. Matulewicz does not receive an economic benefit from someone who is not a client.

**Item 6. [Supervision](#)**

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The Firm has established written policies and procedures to ensure compliance with relevant advisory regulations. Brian Stephenson serves as the Chief Compliance Officer of Holos Integrated Wealth and is responsible for the Firm's compliance with outside regulations and Firm policies. For additional information, please contact Mr. Stephenson at (484) 893-4599.